

GLOBAL OPINIONS AND EXPECTATIONS ABOUT ARTIFICIAL INTELLIGENCE

A Global Advisor survey

January 2022

For more information: <https://www.ipsos.com/en/global-opinions-about-ai-january-2022>

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GAME CHANGERS



VISIT...

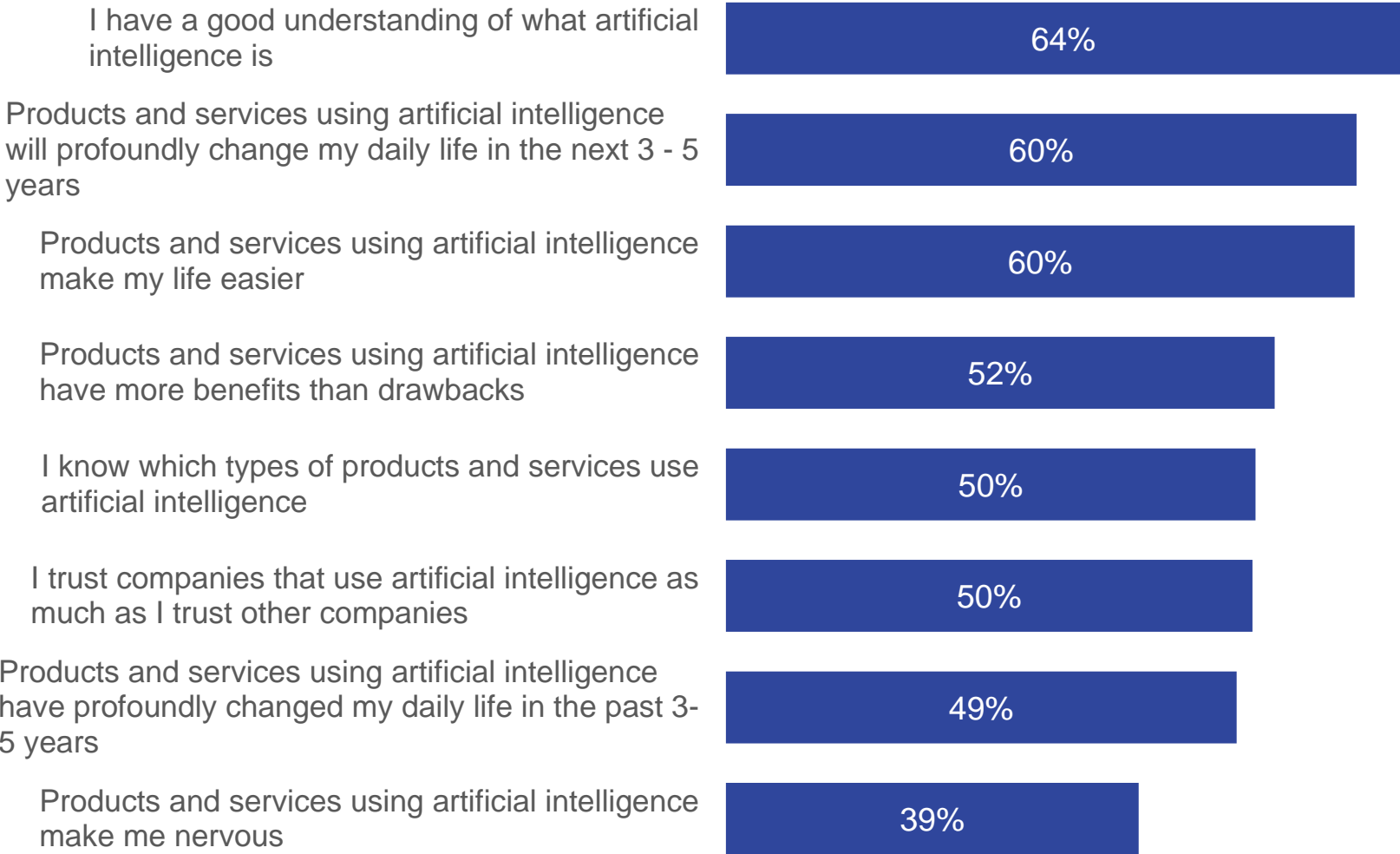
LANZAROTE
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OPINIONS ABOUT ARTIFICIAL INTELLIGENCE (GLOBAL COUNTRY AVERAGE)

Q. Let's now talk about products and services using artificial intelligence (AI). Artificial intelligence refers to computers and robots doing things that traditionally require using human intelligence. How much do you agree or disagree with the following?

% “Agree”

Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.
The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.



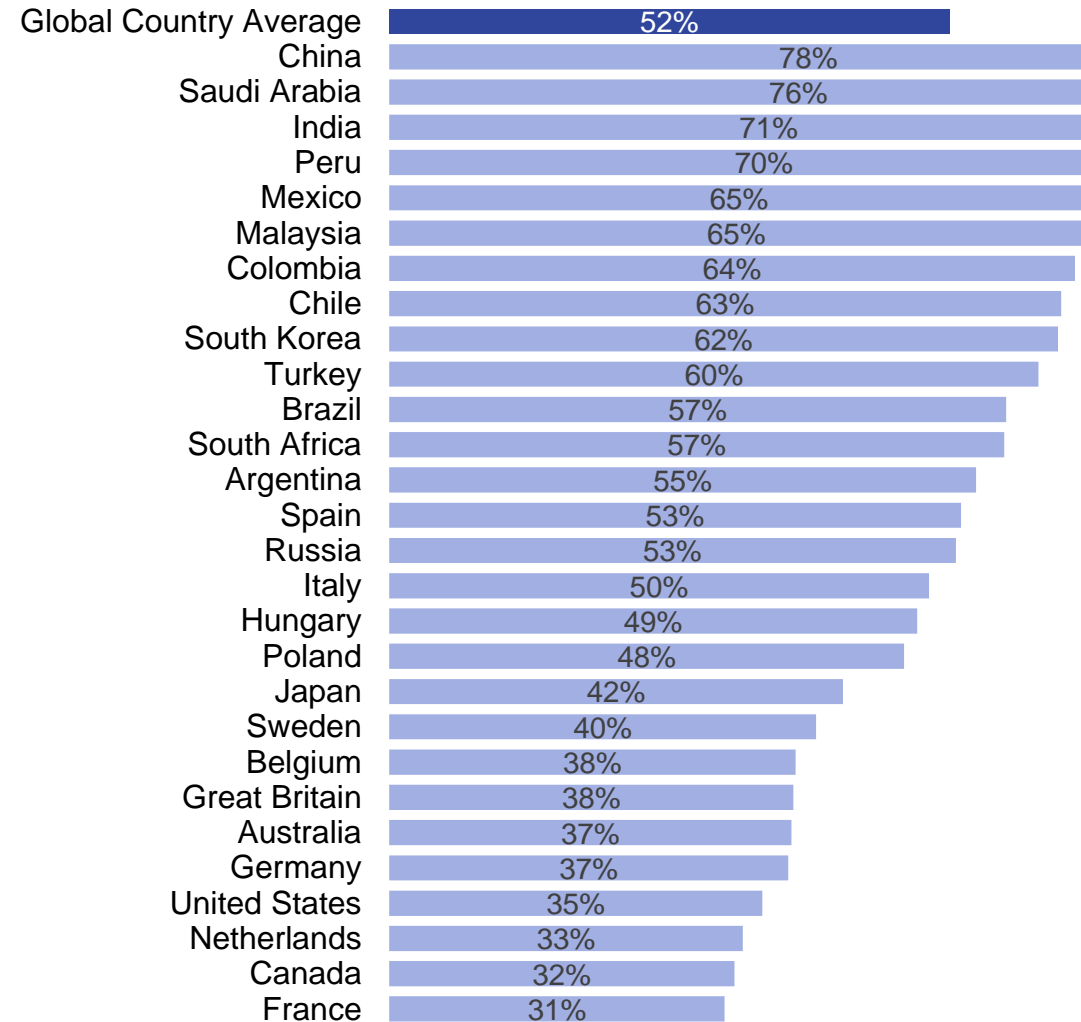
“PRODUCTS AND SERVICES USING ARTIFICIAL INTELLIGENCE HAVE MORE BENEFITS THAN DRAWBACKS” – AGREEMENT BY COUNTRY

Q. Let's now talk about products and services using artificial intelligence (AI). Artificial intelligence refers to computers and robots doing things that traditionally require using human intelligence. How much do you agree or disagree with the following?

“Products and services using artificial intelligence have more benefits than drawbacks”

% “Agree”

Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
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TRUST IN A.I. IS CORRELATED WITH PERCEIVED UNDERSTANDING; BOTH ARE HIGHER IN EMERGING COUNTRIES THAN IN HIGH-INCOME COUNTRIES



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OPINIONS ABOUT ARTIFICIAL INTELLIGENCE – BY COUNTRY

Q. Let's now talk about products and services using artificial intelligence (AI). Artificial intelligence refers to computers and robots doing things that traditionally require using human intelligence. How much do you agree or disagree with the following? % “Agree”

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	Colombia	Germany	Spain	France	Great Britain	Hungary	India	Italy	Japan	South Korea	Mexico	Malaysia	Netherlands	Peru	Poland	Russia	Saudi Arabia	Sweden	Turkey	United States	South Africa
I have a good understanding of what artificial intelligence is	64%	64%	59%	60%	69%	59%	76%	67%	71%	50%	62%	50%	57%	67%	72%	42%	41%	72%	74%	61%	65%	76%	66%	75%	73%	60%	68%	63%	78%
Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years	60%	60%	50%	52%	61%	44%	67%	80%	65%	44%	56%	45%	46%	55%	74%	53%	53%	76%	65%	71%	53%	71%	56%	60%	80%	50%	73%	46%	72%
Products and services using artificial intelligence make my life easier	60%	59%	46%	49%	65%	44%	70%	87%	71%	45%	59%	39%	45%	50%	72%	54%	52%	74%	73%	71%	47%	74%	58%	64%	80%	46%	71%	41%	67%
Products and services using artificial intelligence have more benefits than drawbacks	52%	55%	37%	38%	57%	32%	63%	78%	64%	37%	53%	31%	38%	49%	71%	50%	42%	62%	65%	65%	33%	70%	48%	53%	76%	40%	60%	35%	57%
I know which types of products and services use artificial intelligence	50%	47%	38%	37%	58%	36%	59%	76%	62%	37%	46%	34%	37%	38%	69%	45%	32%	60%	62%	61%	41%	63%	52%	57%	69%	37%	60%	39%	57%
I trust companies that use artificial intelligence as much as I trust other companies	50%	55%	36%	40%	50%	34%	56%	76%	57%	42%	50%	34%	35%	48%	68%	48%	39%	46%	60%	61%	38%	60%	51%	52%	73%	39%	63%	35%	56%
Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years	49%	53%	37%	37%	51%	32%	58%	73%	58%	31%	49%	32%	33%	38%	67%	41%	30%	62%	62%	65%	40%	65%	45%	50%	72%	30%	60%	36%	56%
Products and services using artificial intelligence make me nervous	39%	33%	51%	42%	35%	49%	36%	30%	39%	37%	48%	32%	50%	31%	53%	26%	20%	32%	38%	48%	36%	35%	30%	28%	51%	37%	48%	52%	52%

Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021

Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

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OPINIONS ABOUT ARTIFICIAL INTELLIGENCE – BY DEMOGRAPHICS (GLOBAL COUNTRY AVERAGE)

Q. Let's now talk about products and services using artificial intelligence (AI). Artificial intelligence refers to computers and robots doing things that traditionally require using human intelligence. How much do you agree or disagree with the following?

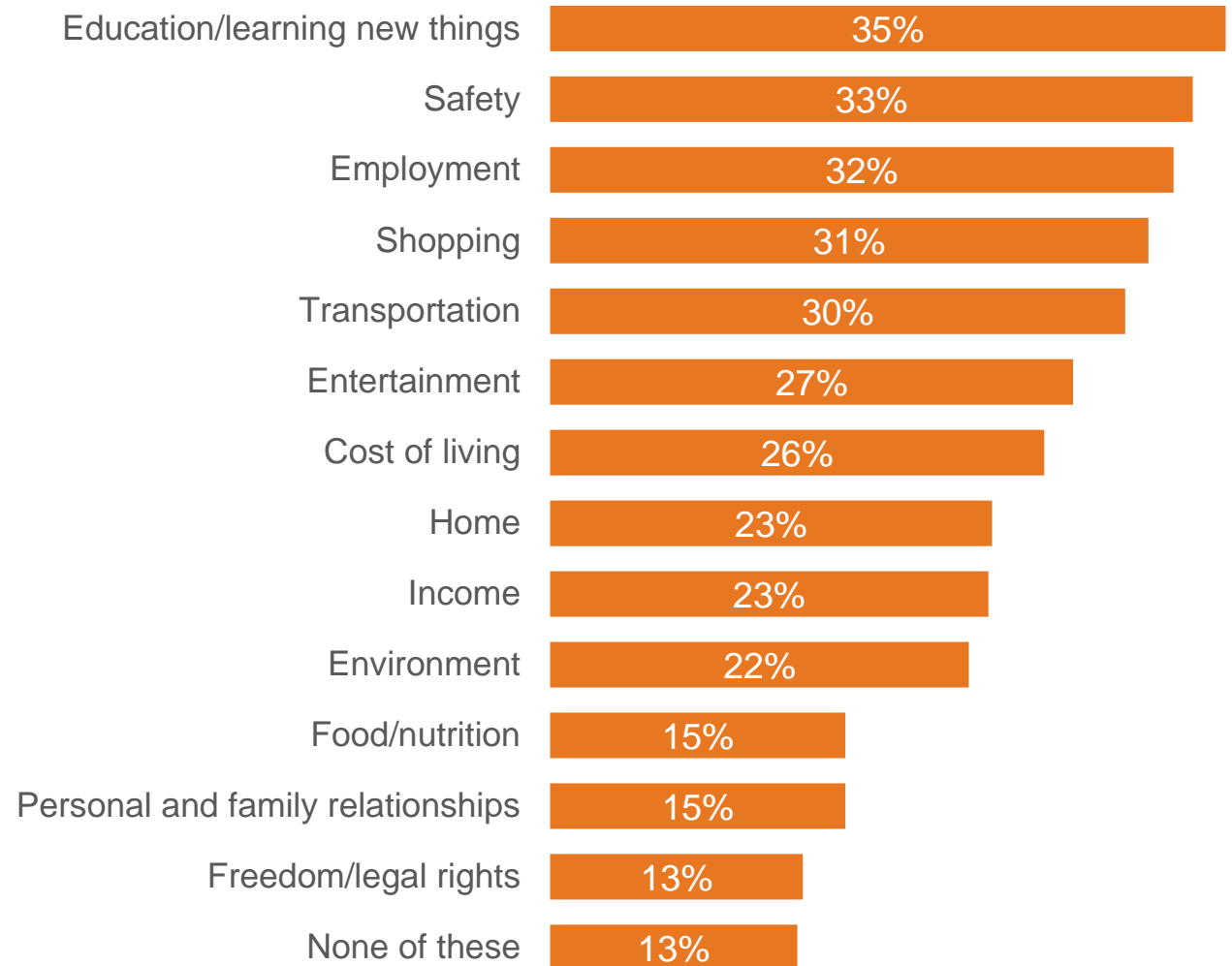
% “Agree”

		Gender		Age			Household Income			Education			Employment Status			
	Global Country Average	Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Business Owner	Sr Exec/Decision Maker	Total Employed	Non Employed
I have a good understanding of what artificial intelligence is	64%	69%	60%	66%	65%	61%	57%	63%	71%	56%	64%	71%	73%	74%	67%	59%
Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years	60%	63%	57%	63%	61%	55%	56%	58%	67%	53%	58%	68%	70%	72%	64%	54%
Products and services using artificial intelligence make my life easier	60%	62%	58%	64%	62%	54%	56%	58%	66%	53%	58%	67%	67%	70%	63%	55%
Products and services using artificial intelligence have more benefits than drawbacks	52%	55%	49%	57%	53%	46%	50%	51%	57%	45%	50%	59%	63%	64%	55%	47%
I know which types of products and services use artificial intelligence	50%	55%	46%	54%	51%	45%	46%	50%	57%	44%	48%	58%	63%	65%	54%	44%
I trust companies that use artificial intelligence as much as I trust other companies	50%	53%	47%	54%	51%	44%	47%	48%	57%	45%	48%	56%	61%	62%	53%	45%
Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years	49%	51%	46%	54%	50%	41%	46%	47%	54%	43%	46%	55%	61%	62%	52%	43%
Products and services using artificial intelligence make me nervous	39%	38%	41%	40%	40%	38%	41%	41%	38%	41%	37%	40%	48%	46%	40%	38%

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AREAS EXPECTED TO **CHANGE** MOST BECAUSE OF A.I. (GLOBAL COUNTRY AVERAGE)

Q. Among these, which do you expect to change most for you and your family in the next 3-5 years specifically because of the increased use of artificial intelligence?



Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
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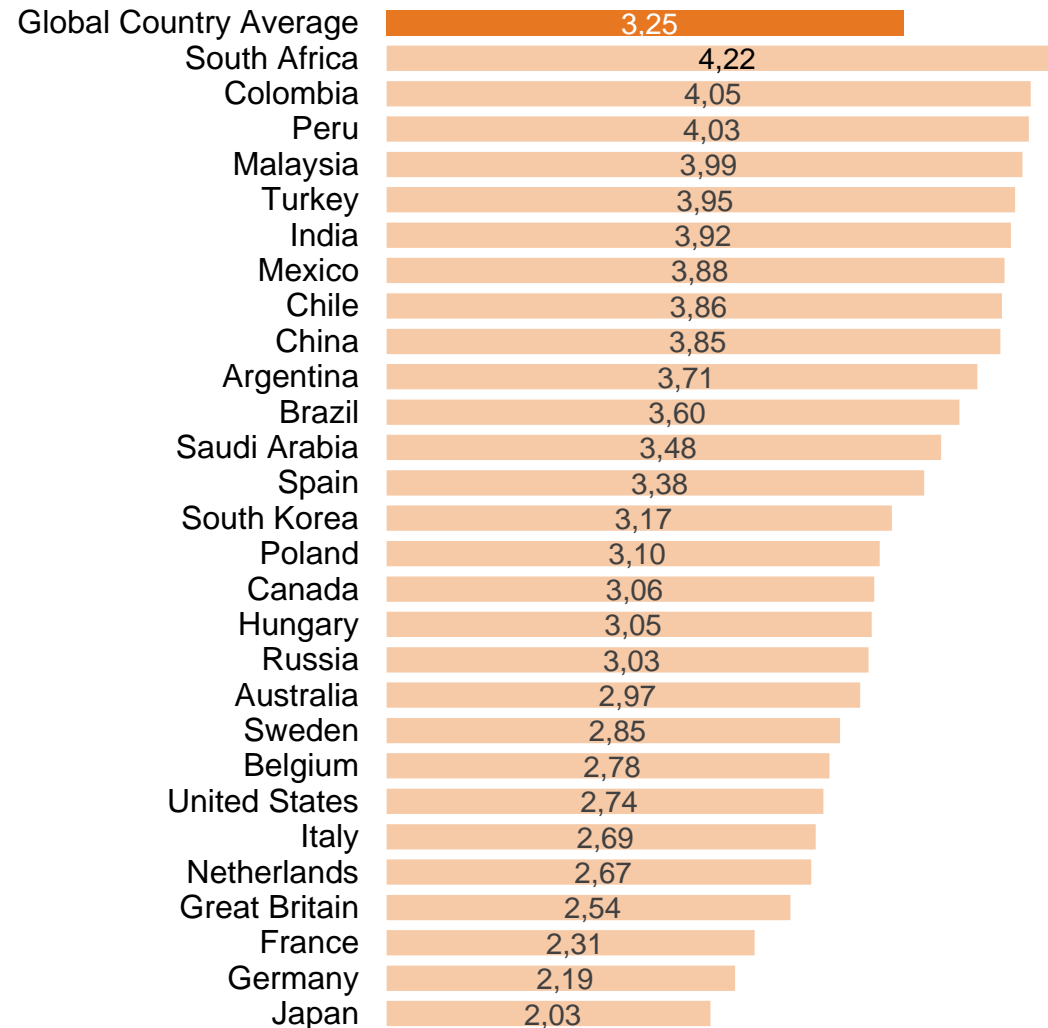
NUMBER OF LIFE AREAS MOST EXPECTED TO **CHANGE** BECAUSE OF A.I. – AVERAGE BY COUNTRY

Q. Among these, which do you expect to change most for you and your family in the next 3-5 years specifically because of the increased use of artificial intelligence?

Average number of life areas cited among these 13:

Education/learning new things
Safety
Employment
Shopping
Transportation
Entertainment
Cost of living
Home
Income
Environment
Food/nutrition
Personal and family relationships
Freedom/legal rights

Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.
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AREAS MOST EXPECTED TO **CHANGE** BECAUSE OF A.I. – BY COUNTRY

Q. Among these, which do you expect to change most for you and your family in the next 3-5 years specifically because of the increased use of artificial intelligence?

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	Colombia	Germany	Spain	France	Great Britain	Hungary	India	Italy	Japan	South Korea	Mexico	Malaysia	Netherlands	Peru	Poland	Russia	Saudi Arabia	Sweden	Turkey	United States	South Africa
Education/learning new things	35%	47%	30%	26%	41%	32%	44%	43%	46%	19%	35%	14%	24%	33%	42%	25%	12%	40%	47%	41%	27%	52%	32%	36%	41%	30%	45%	27%	50%
Safety	33%	54%	24%	32%	41%	24%	42%	31%	46%	26%	40%	30%	18%	27%	40%	30%	25%	27%	44%	37%	30%	55%	28%	32%	21%	31%	40%	24%	37%
Employment	32%	47%	31%	29%	39%	26%	38%	22%	51%	17%	37%	22%	23%	23%	37%	28%	11%	32%	46%	49%	24%	44%	29%	21%	32%	30%	33%	27%	57%
Shopping	31%	23%	37%	26%	33%	34%	32%	44%	29%	24%	25%	21%	34%	31%	35%	27%	23%	33%	27%	32%	33%	27%	34%	33%	40%	25%	37%	31%	38%
Transportation	30%	21%	35%	32%	25%	32%	31%	47%	30%	23%	25%	21%	30%	39%	29%	24%	31%	33%	29%	25%	28%	33%	35%	24%	26%	35%	33%	29%	28%
Entertainment	27%	25%	24%	20%	33%	31%	33%	47%	33%	25%	32%	15%	26%	21%	33%	21%	23%	28%	33%	20%	24%	30%	25%	26%	35%	24%	24%	24%	28%
Cost of living	26%	27%	29%	23%	33%	32%	33%	31%	33%	14%	21%	25%	21%	20%	29%	19%	8%	14%	24%	42%	13%	29%	24%	33%	27%	18%	35%	23%	40%
Home	23%	27%	17%	17%	17%	16%	27%	40%	24%	15%	29%	14%	19%	38%	23%	32%	13%	19%	27%	24%	24%	25%	27%	20%	28%	24%	23%	16%	19%
Income	23%	33%	16%	13%	26%	24%	30%	16%	36%	9%	26%	12%	14%	13%	37%	13%	10%	21%	33%	39%	12%	30%	12%	21%	30%	13%	38%	18%	42%
Environment	22%	27%	17%	20%	24%	16%	31%	28%	28%	19%	20%	15%	15%	15%	28%	17%	20%	31%	28%	30%	18%	23%	22%	20%	19%	15%	24%	18%	23%
Food/nutrition	15%	15%	13%	11%	20%	17%	15%	17%	15%	9%	16%	11%	11%	16%	23%	13%	11%	14%	18%	22%	11%	22%	14%	14%	18%	15%	17%	14%	23%
Personal and family relationships	15%	16%	11%	12%	16%	13%	17%	11%	21%	10%	18%	15%	8%	19%	19%	11%	8%	16%	23%	25%	8%	23%	15%	8%	25%	16%	19%	10%	18%
Freedom/legal rights	13%	9%	14%	19%	12%	11%	15%	9%	12%	10%	15%	15%	12%	10%	18%	10%	8%	10%	10%	13%	16%	12%	15%	17%	9%	7%	28%	15%	19%
None of these	13%	6%	17%	17%	7%	18%	5%	2%	3%	28%	11%	27%	24%	17%	6%	15%	29%	10%	4%	4%	21%	4%	13%	16%	5%	18%	4%	26%	3%

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AREAS MOST EXPECTED TO **CHANGE** BECAUSE OF A.I. – BY DEMOGRAPHICS (GLOBAL COUNTRY AVERAGE)

Q. Among these, which do you expect to change most for you and your family in the next 3-5 years specifically because of the increased use of artificial intelligence?

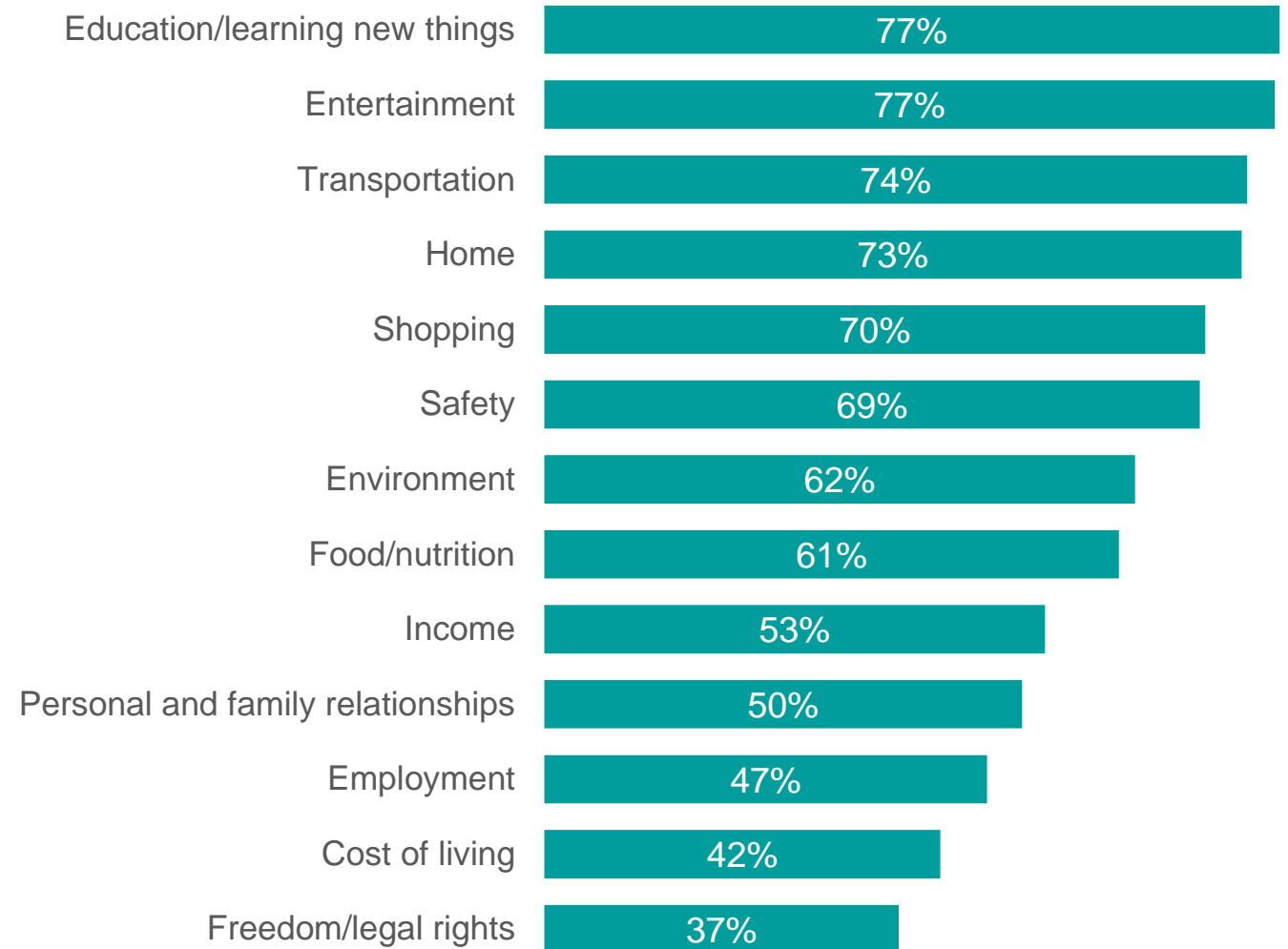
		Gender		Age			Household Income			Education			Employment			
	Global Country Average	Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Business Owner	Sr Exec/Decision Maker	Total Employed	Non Employed
Education/learning new things	35%	33%	37%	37%	36%	33%	31%	34%	39%	31%	35%	39%	37%	38%	35%	35%
Safety	33%	35%	32%	32%	32%	36%	31%	34%	36%	32%	35%	32%	36%	36%	33%	34%
Employment	32%	32%	33%	36%	34%	27%	34%	33%	33%	32%	33%	33%	35%	36%	34%	30%
Shopping	31%	31%	31%	30%	32%	31%	27%	30%	35%	28%	30%	35%	33%	33%	31%	31%
Transportation	30%	33%	27%	30%	28%	32%	27%	29%	33%	25%	30%	33%	31%	30%	30%	30%
Entertainment	27%	30%	25%	29%	28%	24%	24%	27%	30%	22%	26%	32%	27%	29%	28%	25%
Cost of living	26%	25%	26%	26%	27%	25%	25%	27%	26%	26%	27%	24%	27%	28%	26%	25%
Home	23%	23%	23%	24%	23%	22%	22%	22%	25%	22%	23%	24%	23%	24%	23%	22%
Income	23%	22%	23%	27%	22%	18%	26%	22%	23%	25%	22%	22%	28%	27%	24%	21%
Environment	22%	22%	22%	22%	20%	23%	21%	22%	23%	19%	22%	23%	25%	25%	21%	23%
Food/nutrition	15%	15%	16%	18%	14%	14%	17%	16%	15%	16%	15%	15%	19%	18%	15%	17%
Personal and family relationships	15%	16%	15%	16%	16%	13%	15%	17%	15%	16%	15%	16%	19%	18%	16%	14%
Freedom/legal rights	13%	14%	12%	13%	13%	13%	13%	13%	14%	15%	12%	13%	16%	16%	13%	13%
None of these	13%	12%	14%	9%	13%	17%	15%	13%	9%	16%	14%	10%	6%	6%	11%	16%

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AREAS EXPECTED TO IMPROVE BECAUSE OF A.I. (GLOBAL COUNTRY AVERAGE)

Q. Please indicate whether you expect that the increased use of artificial intelligence will make each of the following better or worse for you and your family?

% “Better”



Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
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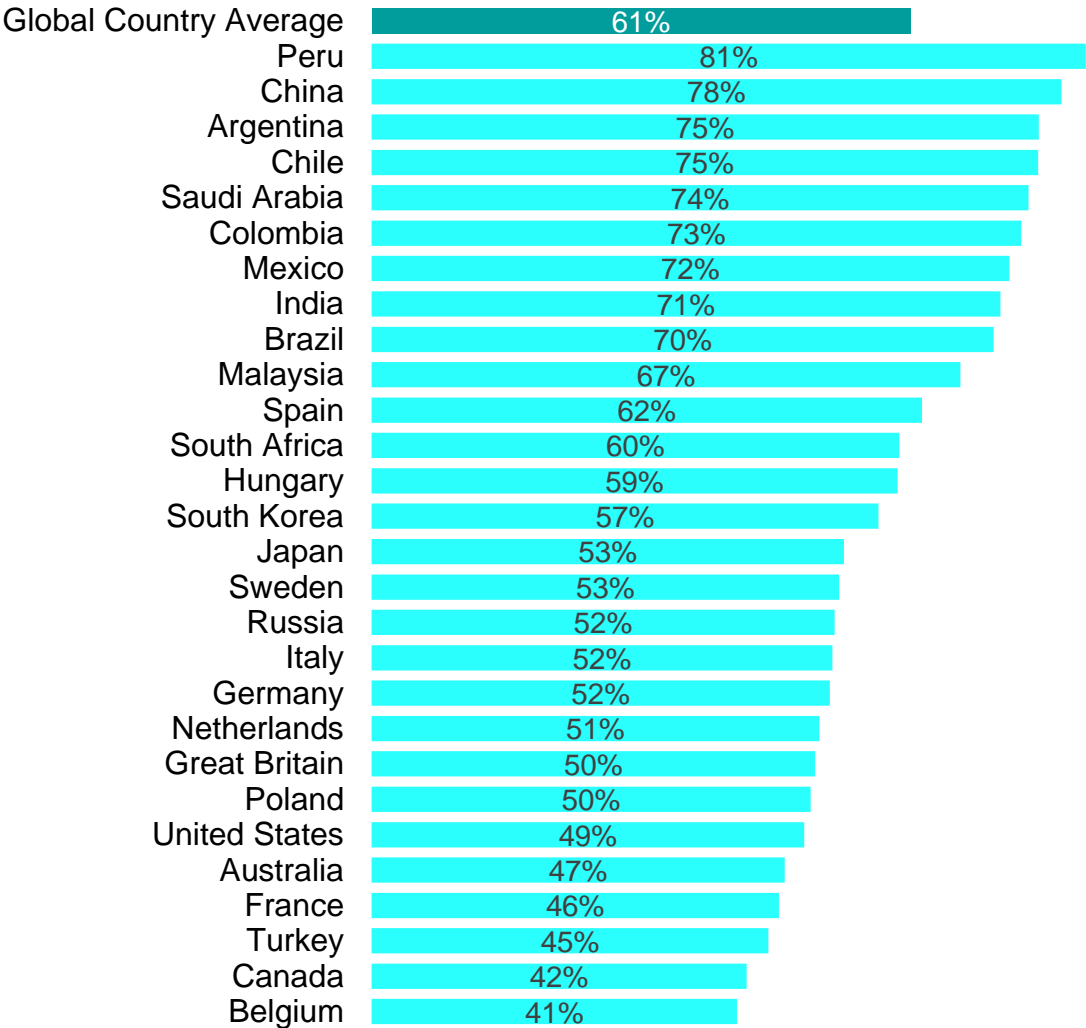
OVERALL EXPECTATION OF LIFE IMPROVEMENT BECAUSE OF A.I. (AVERAGE FOR 13 AREAS)

Q. Please indicate whether you expect that the increased use of artificial intelligence will make each of the following better or worse for you and your family?

Average of % “Better” for 13 areas:

- Education/learning new things
- Safety
- Employment
- Shopping
- Transportation
- Entertainment
- Cost of living
- Home
- Income
- Environment
- Food/nutrition
- Personal and family relationships
- Freedom/legal rights

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AREAS EXPECTED TO IMPROVE BECAUSE OF A.I. – BY COUNTRY

Q. Please indicate whether you expect that the increased use of artificial intelligence will make each of the following better or worse for you and your family? % “Better”

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	Colombia	Germany	Spain	France	Great Britain	Hungary	India	Italy	Japan	South Korea	Mexico	Malaysia	Netherlands	Peru	Poland	Russia	Saudi Arabia	Sweden	Turkey	United States	South Africa
Education/learning new things	77%	89%	65%	56%	85%	60%	87%	91%	90%	64%	80%	63%	71%	75%	82%	74%	71%	84%	86%	73%	61%	93%	70%	65%	89%	73%	64%	63%	79%
Entertainment	77%	83%	71%	63%	86%	60%	89%	91%	87%	60%	83%	53%	72%	69%	84%	75%	67%	77%	89%	74%	67%	92%	62%	76%	87%	65%	72%	70%	81%
Transportation	74%	84%	60%	56%	80%	57%	87%	93%	86%	66%	81%	69%	58%	76%	76%	72%	72%	89%	79%	80%	72%	86%	65%	76%	85%	65%	70%	62%	69%
Home	73%	82%	66%	56%	72%	63%	87%	93%	84%	63%	78%	57%	65%	72%	67%	79%	78%	66%	70%	73%	70%	84%	70%	77%	80%	65%	56%	72%	68%
Shopping	70%	82%	51%	44%	81%	58%	86%	91%	86%	52%	70%	56%	63%	69%	74%	63%	72%	79%	90%	73%	53%	89%	62%	69%	86%	47%	48%	62%	80%
Safety	69%	86%	51%	55%	84%	49%	80%	84%	80%	63%	65%	61%	61%	62%	76%	70%	71%	65%	78%	70%	54%	83%	53%	57%	85%	58%	55%	58%	68%
Environment	62%	75%	45%	42%	69%	42%	78%	81%	70%	62%	73%	44%	51%	68%	71%	61%	56%	52%	74%	62%	55%	85%	46%	49%	72%	50%	51%	54%	58%
Food/nutrition	61%	75%	50%	34%	75%	40%	86%	80%	73%	54%	62%	43%	50%	54%	71%	45%	69%	54%	68%	72%	55%	74%	56%	41%	66%	74%	32%	50%	51%
Income	53%	77%	42%	41%	67%	25%	70%	60%	70%	39%	53%	35%	35%	47%	65%	24%	13%	31%	72%	60%	40%	79%	44%	40%	73%	36%	28%	33%	48%
Personal and family relationships	50%	48%	37%	26%	50%	31%	60%	73%	53%	42%	49%	39%	49%	52%	68%	39%	28%	43%	57%	71%	29%	76%	38%	52%	56%	52%	29%	42%	51%
Employment	47%	68%	28%	21%	57%	30%	61%	48%	59%	43%	48%	31%	32%	49%	59%	29%	22%	19%	70%	61%	43%	74%	34%	32%	61%	45%	19%	31%	40%
Cost of living	42%	68%	26%	23%	55%	21%	59%	54%	54%	33%	33%	22%	26%	46%	62%	27%	30%	41%	54%	49%	44%	78%	23%	27%	52%	37%	26%	24%	41%
Freedom/legal rights	37%	64%	16%	21%	55%	17%	50%	75%	62%	33%	35%	27%	19%	34%	71%	19%	46%	45%	52%	46%	15%	56%	22%	21%	75%	21%	33%	16%	40%

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AREAS EXPECTED TO IMPROVE BECAUSE OF A.I. – BY DEMOGRAPHICS (GLOBAL COUNTRY AVERAGE)

Q. Please indicate whether you expect that the increased use of artificial intelligence will make each of the following better or worse for you and your family?

% “Better”

		Gender		Age			Household Income			Education			Employment			
	Global Country Average	Male	Female	Under 35	35 to 49	50 to 74	Low	Medium	High	Low	Medium	High	Business Owner	Sr Exec/Decision Maker	Total Employed	Non Employed
Education/learning new things	77%	78%	77%	76%	77%	79%	76%	77%	79%	67%	79%	82%	82%	82%	78%	76%
Entertainment	77%	78%	76%	79%	76%	74%	75%	77%	78%	71%	78%	79%	80%	81%	78%	76%
Transportation	74%	76%	72%	76%	73%	72%	70%	73%	77%	67%	72%	80%	75%	76%	75%	72%
Home	73%	75%	72%	74%	74%	73%	70%	71%	77%	66%	73%	79%	75%	74%	76%	70%
Shopping	70%	72%	68%	73%	71%	64%	67%	69%	72%	59%	70%	75%	71%	74%	72%	65%
Safety	69%	70%	68%	70%	70%	67%	65%	70%	71%	64%	69%	72%	71%	74%	71%	66%
Environment	62%	64%	60%	61%	63%	63%	58%	62%	65%	53%	63%	67%	70%	69%	64%	59%
Food/nutrition	61%	61%	60%	63%	63%	55%	61%	62%	60%	54%	62%	64%	68%	68%	63%	58%
Income	53%	55%	51%	56%	54%	45%	52%	56%	52%	45%	55%	57%	61%	62%	56%	48%
Personal and family relationships	50%	52%	49%	55%	50%	45%	56%	50%	49%	46%	52%	52%	62%	60%	54%	44%
Employment	47%	47%	46%	50%	47%	41%	48%	48%	46%	39%	50%	48%	60%	59%	50%	41%
Cost of living	42%	43%	40%	47%	43%	34%	43%	40%	43%	34%	42%	48%	55%	54%	45%	36%
Freedom/legal rights	37%	38%	37%	45%	37%	28%	41%	38%	38%	35%	36%	41%	49%	52%	41%	32%

Base: 19,504 online adults aged 16-74 across 28 countries, Nov.–Dec. 2021
Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.
The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

METHODOLOGY

These are the results of a 28-country survey conducted by Ipsos on its Global Advisor online platform. Ipsos interviewed a total of 19,504 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, and 16-74 in 23 other markets between November 19 and December 3, 2021.

The sample consists of approximately 1,000 individuals in each of Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the U.S., and 500 individuals in each of Argentina, Belgium, Chile, Colombia, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

Ipsos is the third largest Insights and Analytics company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

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At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

